

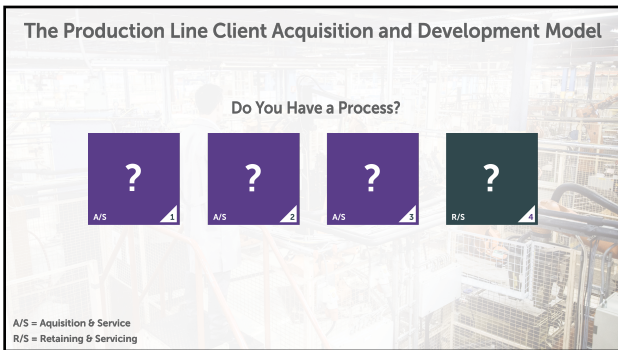


2019 MDRT Top of the Table Annual Meeting e-Handout Material

Title:	The Production Line Client Acquisition and Development Model
Speaker:	David Blake
Presentation Date:	Thursday September 26, 2019
Presentation Time:	10:30 a.m. -12:00 p.m.
Session Room:	Congressional Ballroom B-C

The Million Dollar Round Table® (MDRT) does not guarantee the accuracy of tax and legal matters and is not liable for errors and omissions. You are urged to check with tax and legal professionals in your state, province or country. MDRT also suggests you consult local insurance and security regulations and your company's compliance department pertaining to the use of any new sales materials with your clients. The information contained in this handout is unedited; errors, omissions and misspellings may exist. Content may be altered during the delivery of this presentation.







The Production Line Client Acquisition and Development Model




- REVIEW CURRENT COVERAGE
- SECURE CENSUS DATA
- SECURE UNDERWRITING OFFERS
- PRESENT RECOMMENDATIONS

The Production Line Client Acquisition and Development Model



- COMMUNICATION MATERIALS
- PRE-ENROLLMENT AND INTERNAL STAFF PRESENTATIONS
- ENROLLMENT AND RE-ENROLLMENT TIMELINES
- TERMINATION PROCESSES

The Production Line Client Acquisition and Development Model



- UPDATING OF RECORDS
- EVALUATION OF NEW EMPLOYER BENEFITS
- CHANGE IN BILLING
- SUPPORT OF FUTURE INCREASE OPPORTUNITIES
- PROMOTE ADDITIONAL PRODUCTS AND SERVICES
- INTRODUCE TO LOCAL RELATIONSHIP

